



COUNTY OF SAN DIEGO  
**Great Government Through the General Management System – Quality, Timeliness, Value**  
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

RECORDABLE DOCUMENTS SPECIALIST I	Class No. 002917
RECORDABLE DOCUMENTS SPECIALIST II	Class No. 002918
RECORDABLE DOCUMENTS SPECIALIST III	Class No. 002919

■ CLASSIFICATION PURPOSE

To perform detailed research and examination of legal documents for conformity to the recording and indexing requirements of Federal, State, City and County government codes and ordinances; to perform detailed abstraction and indexing work according to law in order to prepare an index of official records; and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

Recordable Documents Specialist class series is allocated only to the Office of the Assessor/Recorder/County Clerk, Recording Division. Recordable Documents Specialists process legal documents requiring substantial knowledge of special aspects of the law related to receiving, reviewing, and making determinations on the legal recordability of documents.

County Recorders are required by law to examine, reject or record all documents that are presented for recording that same day, and prepare an official records index of recorded documents within two business days regardless of volume. Recordable Documents Specialists work within this time frame and are subject to strict legal criteria governing recording determinations, indexing operations and quality review standards.

Recordable Documents Specialist I:

This is the entry-level class in the series. Under immediate supervision, incumbents assist Specialist II and III levels with document processing, recording, or indexing work. As incumbents learn the work, they are expected to work with greater independence, speed, and accuracy on documents of increasing complexity while meeting office and legal time frames. Public contact increases as incumbents become more familiar with processing of public records.

Recordable Documents Specialist II:

This is the journey-level class in the series. Under general supervision, incumbents independently research, record and index legal documents. This class is responsible for providing the public with authoritative assistance on a wide range of documents (over 1,000) pertaining to the acceptability of legal documents submitted for recording as public records. Incumbents in this class may also act as a lead worker providing technical guidance and training to others in the process of recording or indexing documents.

Recordable Documents Specialist III:

This is the supervising and highest class in the series. Under general supervision, incumbents are responsible for: training, supervising, and evaluating the work of Recordable Documents Specialist staff; completing the most difficult document research, evaluation, and document processing cases; and handling the more difficult public contact situations. Incumbents in this class report to an Assistant Division Chief, Assessor/Recorder/County Clerk.

■ ESSENTIAL FUNCTIONS

**The examples of essential functions listed in the class specification(s) are representative but not necessarily exhaustive or descriptive of any one position in the class(es). Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.**

Essential Functions (apply to both options):

1. Researches, and interprets a wide variety of government codes, regulations, and ordinances related to the legal recording of all manner of legal documents relating to real and personal property with speed and accuracy.
2. Detects discrepancies in documents.
3. Verifies parcel numbers, transfer tax and taxes prior to endorsement of documents.
4. Collects and collates documents by recording number.

5. Researches documents and codes applicable to official records indexing.
6. Provides responsive, high quality service to County employees, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.
7. Applies laws, policies and procedures related to the legal recording and/or indexing of documents in a California County Recorder's Office.

Recording Option (In addition to the common essential functions):

1. Accepts or rejects documents for recording.
2. Communicates with the public including attorneys, realtors, and title insurers effectively, orally and in writing.
3. Determines document type, documentary transfer taxes, and collects proper taxes and fees.
4. Examines individual documents to ensure each contain the legal requirements to record.
5. Determines whether the document presented is an original or certified copy authorized for recording.
6. Operates automated recording system to endorse original documents, conformed copies, and Preliminary Change of Ownership forms with pertinent recording information.
7. Uses computerized system to generate lien notices and correspondence to return unrecordable documents.
8. Provides customer service by phone, mail, through title companies, attorney services and directly at the counter.
9. Performs cash handling and balancing of drawers on a daily basis.
10. Determines which documents fall into the "time sensitive" category and ensures they are processed in a timely manner.
11. Provides accurate information to the public as to the requirements and fees needed to record their documents.
12. Directs the public to the proper agency to help with their legal questions.
13. Sorts and distributes legal documents received by mail pertaining to the Recording Division and other divisions.
14. Determines the acceptability of the notarized portion of a document, including all out-of-state notarizations.

Indexing Option (In addition to the common essential functions):

1. Utilizes codes and sequences data in a computerized system of specialized abbreviations.
2. Verifies the work of other persons engaged in recording and indexing documents.
3. Processes error corrections and maintains index volumes on current basis.
4. Checks computer output for accuracy and completeness.
5. Scans and abstracts, with speed and accuracy, pertinent real and personal property information from a wide variety of legal source documents including, but not limited to: deeds, decrees of distribution, court orders, contracts, vital records, and business documents for proper indexing of official records according to various legislative codes.
6. Maintains thorough and accurate indexing of all recordable documents.

Recordable Documents Specialist II:

All the duties listed above and:

1. Trains subordinates involved in the preparation, processing, recording or indexing of recordable documents; provides information to the supervision regarding performance of subordinates.

Recordable Documents Specialist III:

All the duties listed above and:

1. Trains, supervises, and evaluates subordinates involved in the preparation, processing, and indexing of recordable documents, utilizing the appropriate software and hardware to ensure proper recording and abstracting decisions are made.
2. Performs the more complex recordable documents specialist work.

3. Performs quality assurance work and initiates corrective action when errors are discovered.
4. Provides authoritative interpretations of state laws, ordinances, and policies related to the recording of documents.
5. Coordinates work to ensure that legal deadlines are met.

#### ■ KNOWLEDGE, SKILLS AND ABILITIES

##### Knowledge of:

The following apply to all classes:

- Legal terminology, procedures, and forms necessary to process recordable documents.
- General principles and practices pertaining to real estate title and encumbrances (loans and mortgages) on real property.
- Policies, procedures and functions of a County Recorder's Office.
- Legal and administrative recording requirements of official records documents.
- Legal and contractual procedures and transactions.
- Knowledge of recording methods, including electronic/computerized data entry, storage, retrieval and document production techniques.
- Telephone, office, and online etiquette.
- County customer service objectives and strategies.

##### Recordable Documents Specialist III (In addition to the above):

- Principles of supervision and training.
- Workflow, work schedules, and work priorities.

##### Skills and Abilities to:

The following apply to all classes:

- Learn and apply laws, policies and procedures related to the legal recording of documents in a California County Recorders Office.
- Independently use legal books, indices, and other resources to determine the requirements for recording and indexing documents.
- Research and interpret a wide variety of documents submitted by the public using guidelines set by the State of California and local ordinances such as: California Administrative, Government, Business & Professions, and Civil codes; Code of Civil Procedures; Commercial, Corporation, Education, Evidence, Family, Fish and Game, Health & Safety, Labor, Penal, Probate, Street & Highway, Revenue & Taxation codes.
- Review legal documents and records for accuracy, completeness, and conformance with prescribed legal requirements.
- Meet strict legal deadlines.
- Work within established formats, priorities, and perform work in required sequences.
- Operate standard office equipment, including but not limited to, computers, printers, calculators, copy and fax machines, and automated telephone equipment.
- Communicate effectively, orally and in writing.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.
- Maintain thorough and accurate indexing of all recordable documents.
- Use the Recorder's computerized recording system, Grantor/Grantee index and the Assessor's property information system to perform work.
- Establish and maintain effective working relationships with management, employees, employee representatives and the public representing diverse cultures and backgrounds.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.

##### Recordable Documents Specialist II (In addition to the above):

- Determine the type of recordable document submitted, determine and/or calculate recording fees.
- Perform quality review of documents to ensure document meets all applicable mandated requirements.
- Communicate all legal recording requirements to title company representatives, attorneys, corporate representatives, and the general public.
- Determine the acceptability of the notarized portion of a document, including all out-of-state notarizations.
- Recognize and determine the quality of a document for photographic reproduction.

##### Recordable Documents Specialist III (In addition to the above):

- Provide training, supervision, and quality control oversight to subordinate staff performing legal document recording and indexing work.

- Perform the most difficult document research, verification, indexing, and recording work.
- Interpret and explain complex regulations, policies, and procedures.
- Coordinate hardware, software, and personnel for optimal utilization of technical and human resources.
- Ensure that supervised work meets prescribed legal deadlines and quality standards.
- Effectively handle the most sensitive and complex recording and indexing issues.
- Convey comprehensive directions through oral and written communication.

#### ■ EDUCATION/EXPERIENCE

**Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Examples of qualifying education/experience are:**

##### Recordable Documents Specialist I:

1. One (1) year of full-time experience in a California County Records Office performing legal document processing, recording or indexing work. Experience must have included: receiving, reviewing and making determinations on the legal recordability of documents that establish a public record of ownership of real property; qualifying transactions in personal property; recording and indexing legal documents affecting real property parcel and property tax information, OR
2. Two (2) years of full-time experience in a public or private agency performing title insurance, financial or escrow work, which included responsibility for interpreting and preparing recordable documents; AND, completion of a course related to recordable document processing from an accredited college, or recognized program, OR
3. Two (2) years of full-time experience abstracting information from real estate documents for preparation of a real estate index of recorded documents in a mortgage or real estate company, title company/plant, or financial institution, OR
4. Two (2) years of full-time clerical experience in a California County Recorder's Office reviewing and processing recorded documents and using the Grantor/Grantee Index.

**NOTE:** Completion of an approved or accredited paralegal program is highly desirable.

##### Recordable Documents Specialist II:

1. Eighteen (18) months of experience as a Recordable Documents Specialist I in the County of San Diego, OR
2. Three (3) years of full-time experience in a California County Records Office performing legal document processing, recording or indexing work. Experience must have included: receiving, reviewing and making determinations on the legal recordability of documents that establish a public record of ownership of real property; qualifying transactions in personal property; recording and indexing legal documents affecting real property parcel and property tax information.

##### Recordable Documents Specialist III:

1. Three (3) years of experience as a Recordable Document Specialist II in the County of San Diego or equivalent class in another agency.

#### ■ ESSENTIAL PHYSICAL CHARACTERISTICS

**The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification(s). Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.**

Continuous upward and downward flexion of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers and copiers. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level. Some positions may require some physical labor on a continuous basis, including lifting up to 50 pounds.

#### ■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

##### License

None required.

##### Certification/Registration

None required.

#### Working Conditions

The County Recorder is required by law to record all documents that are presented for recording that day, regardless of volume. This work is subject to strict legal criteria and quality review standards. Mandatory overtime is frequently required with little or no prior notice.

#### Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on number, severity, and recency. Applicants will be subject to a background investigation.

#### Probationary Period

Incumbents appointed to permanent positions in these classifications shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

**New: July 30, 1999**  
**Revised: March 5, 2004**  
**Revised: June 8, 2004**  
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Union Code: PS  
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Union Code: MM

Variable Entry: Y  
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